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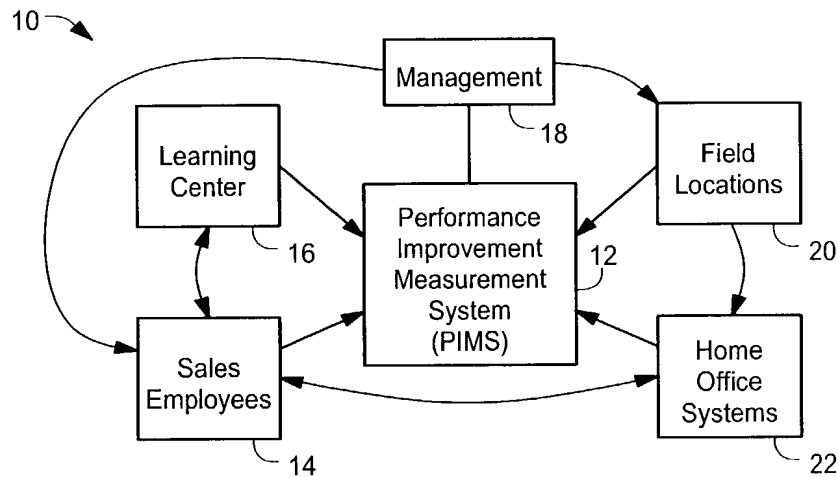


FIG. 1

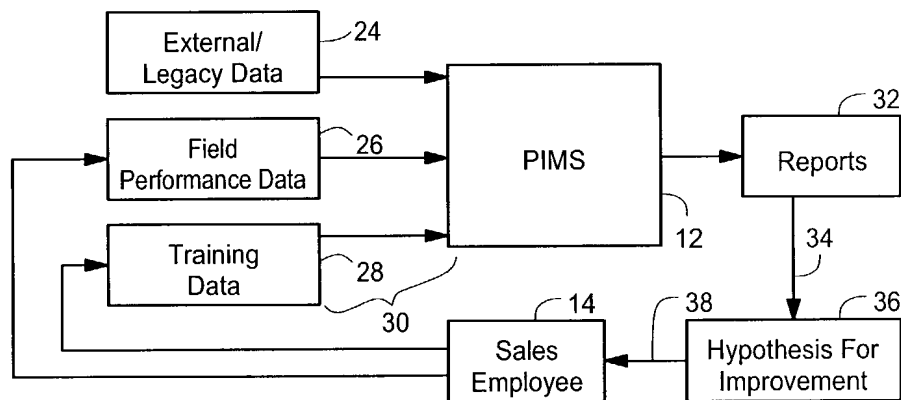


FIG. 2

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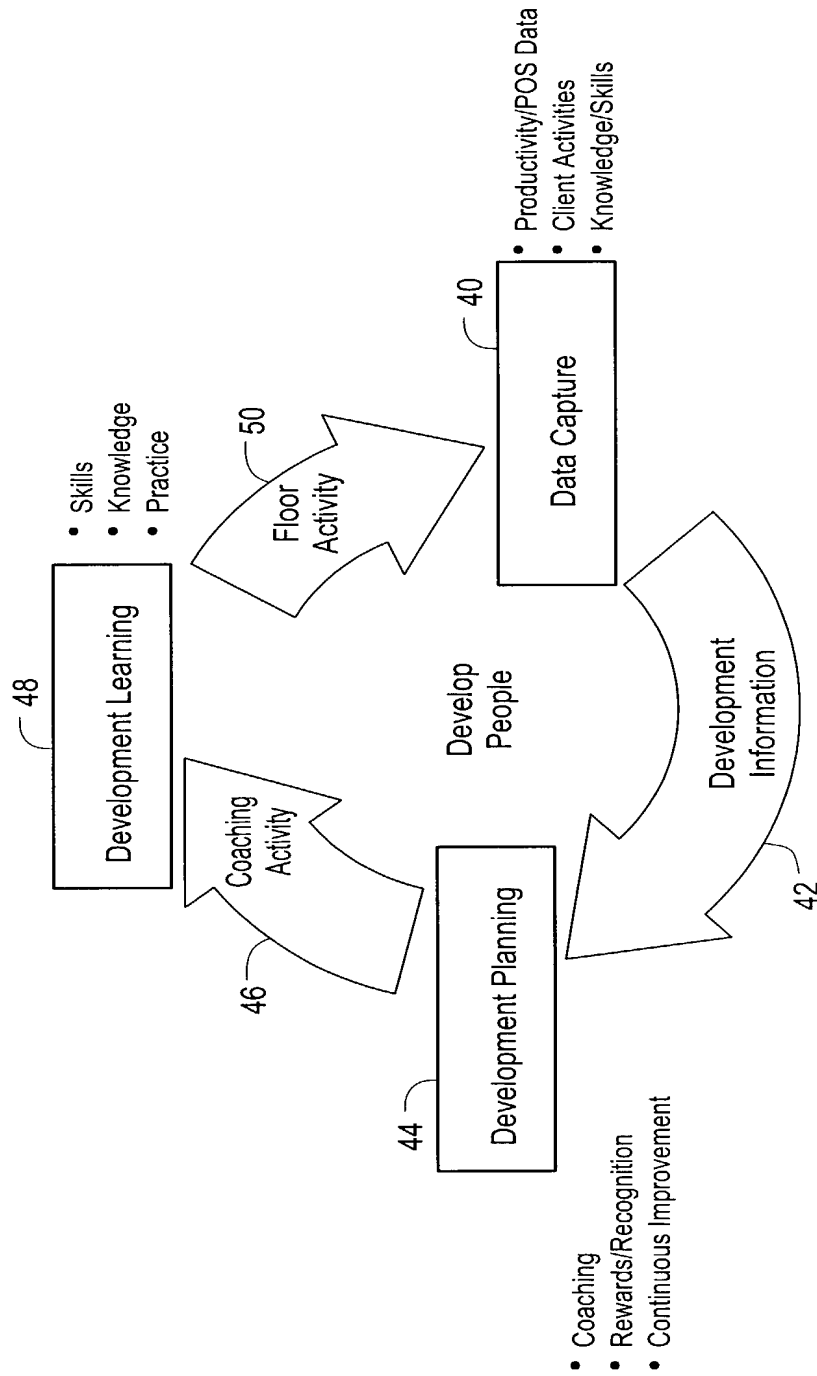


FIG. 3

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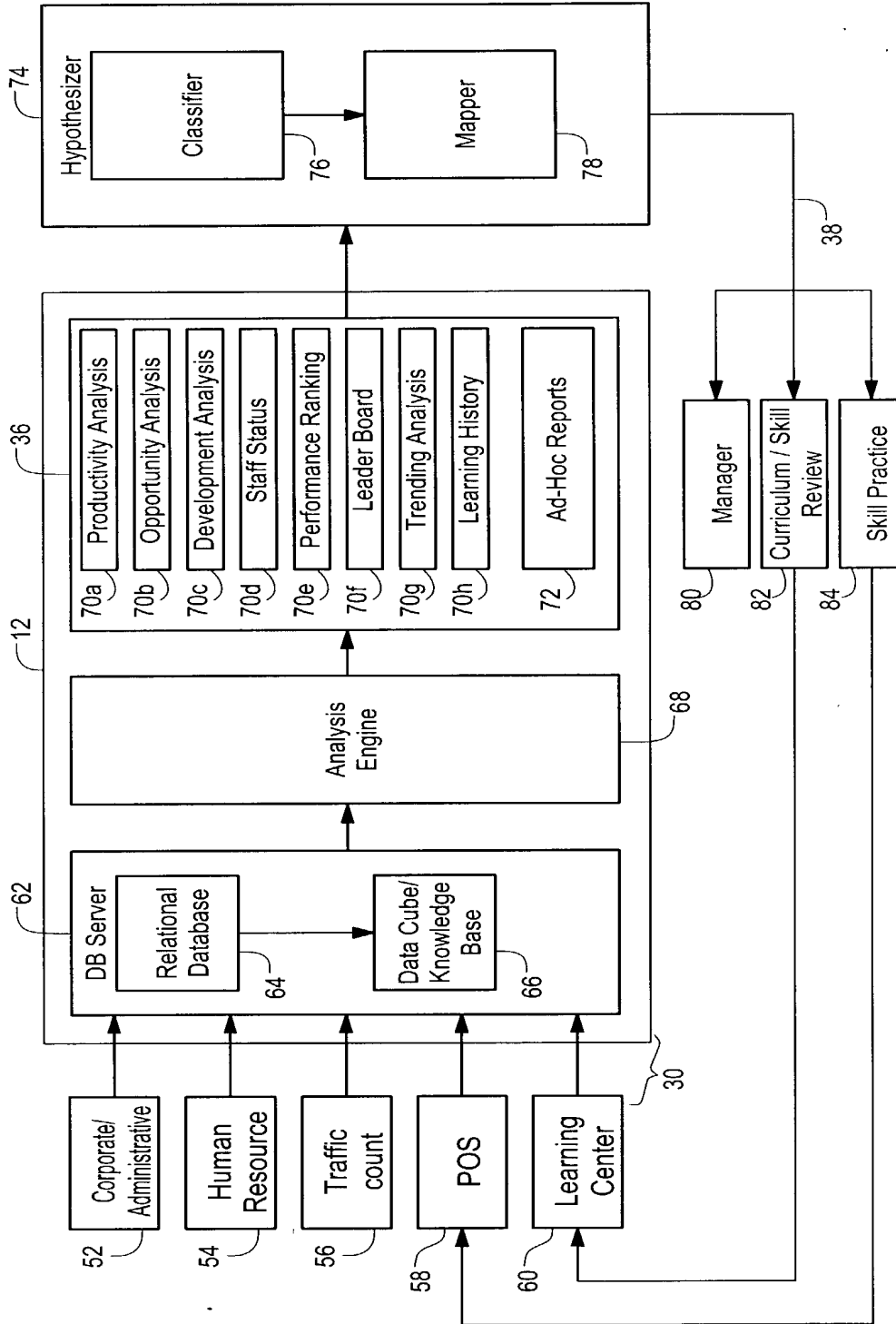


FIG. 4

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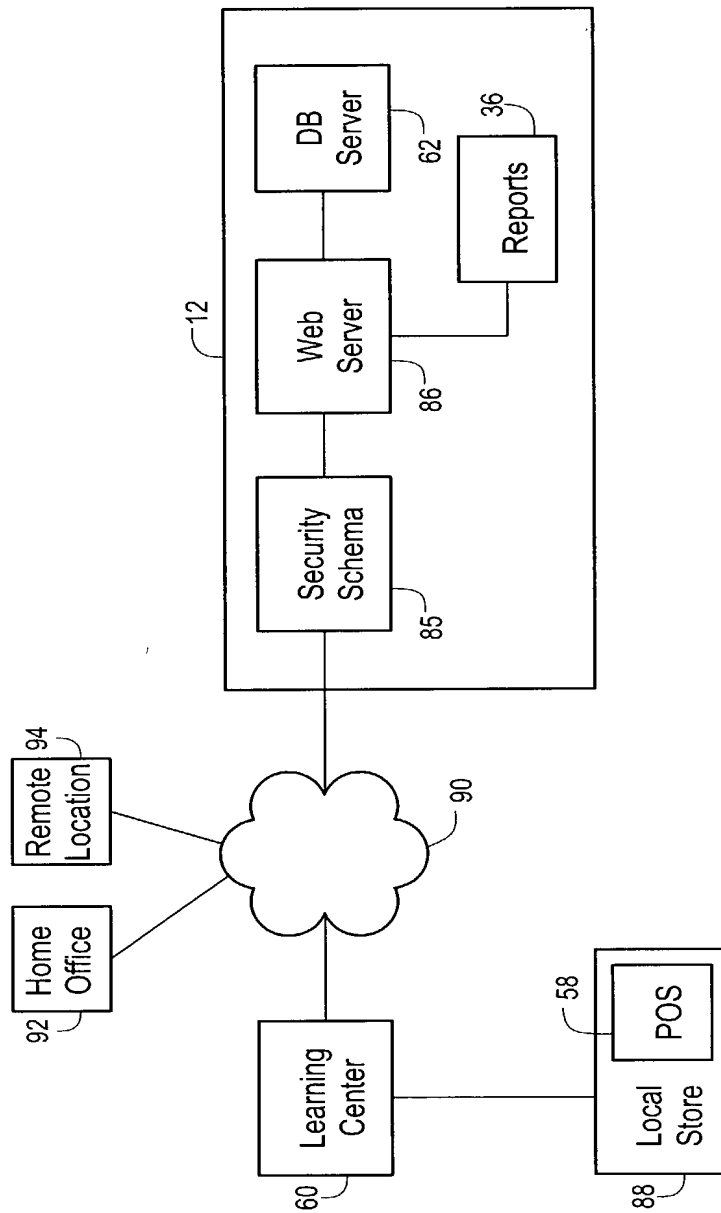


FIG. 5

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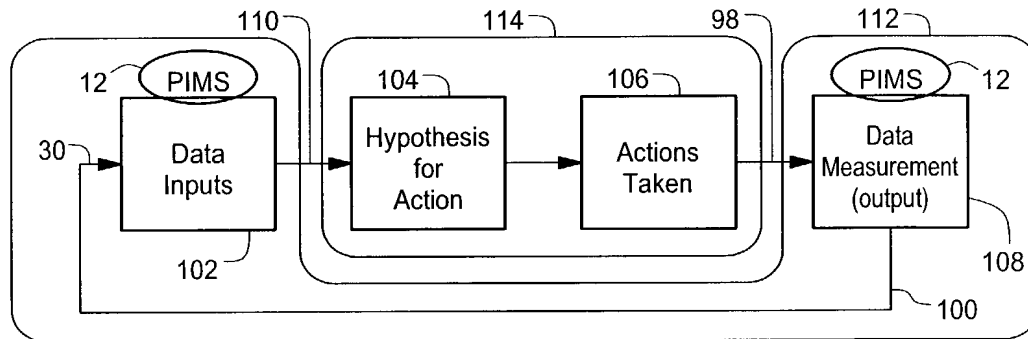


FIG. 6

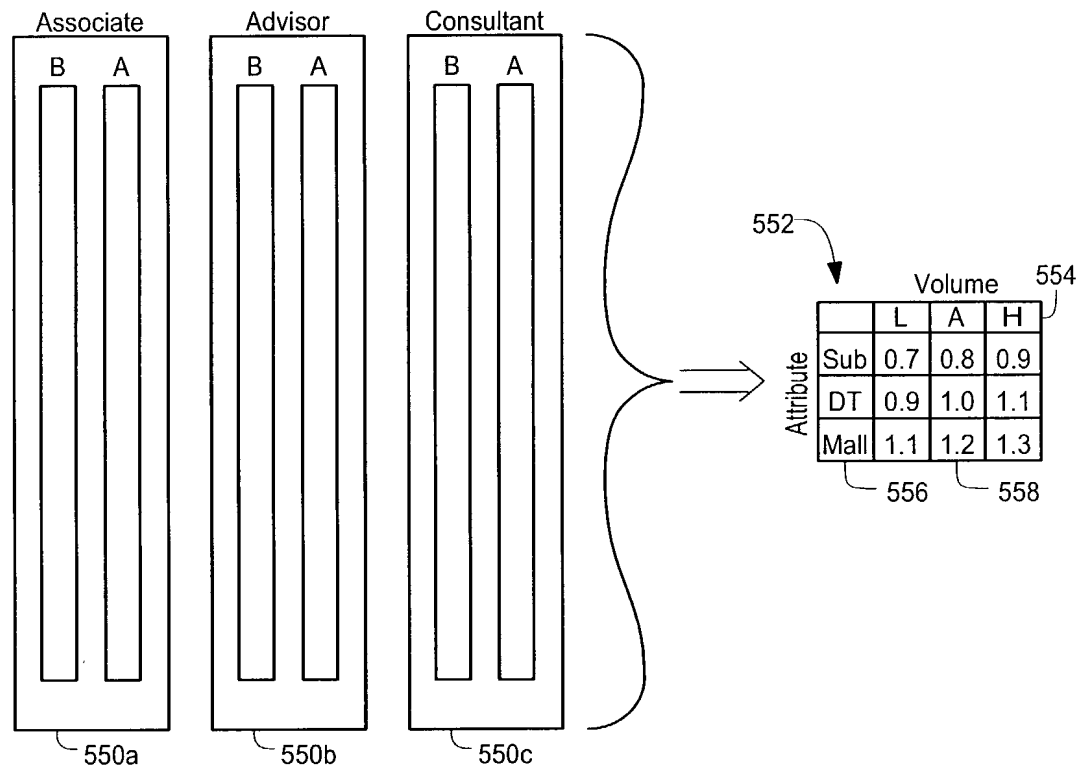


FIG. 10

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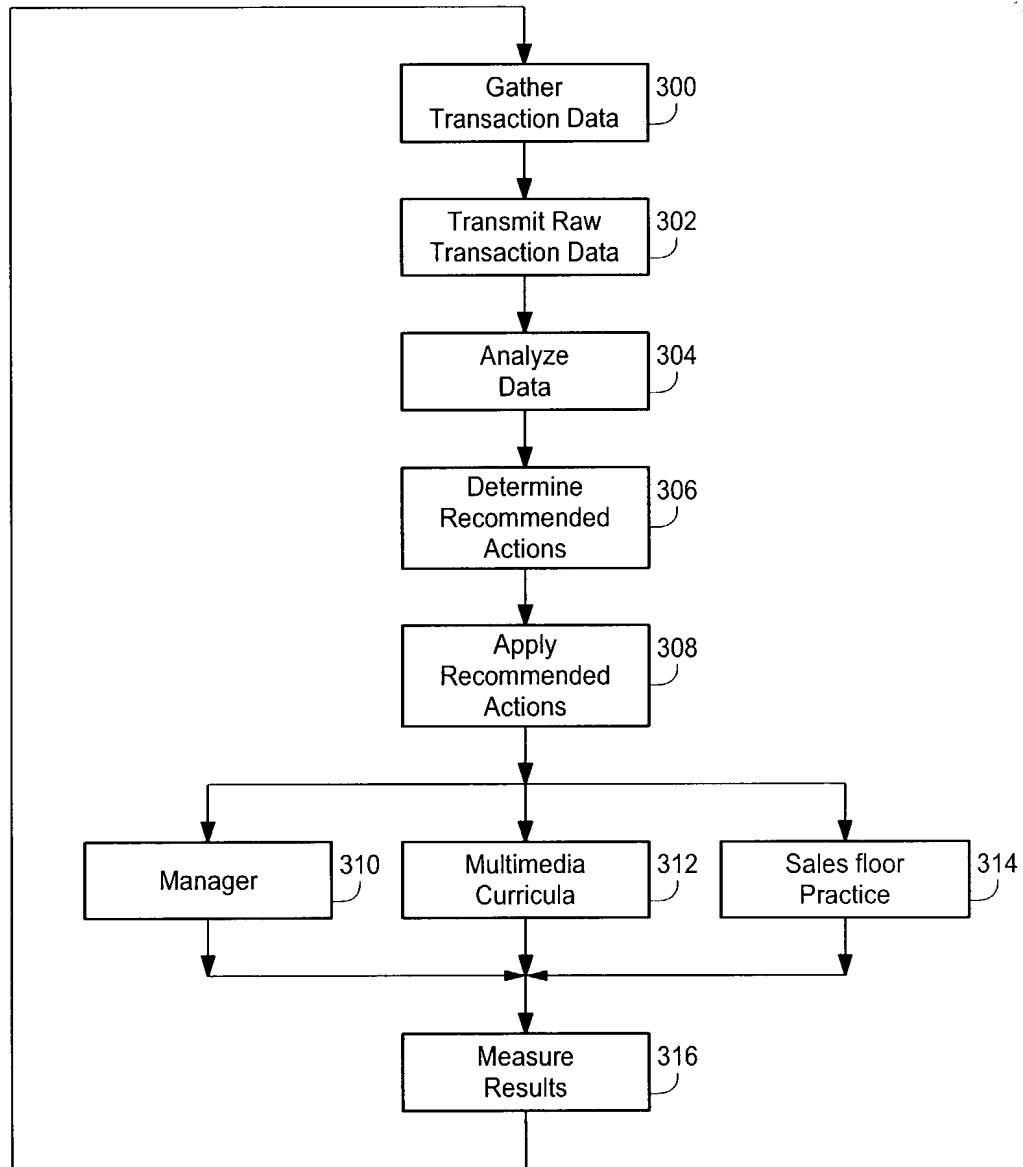
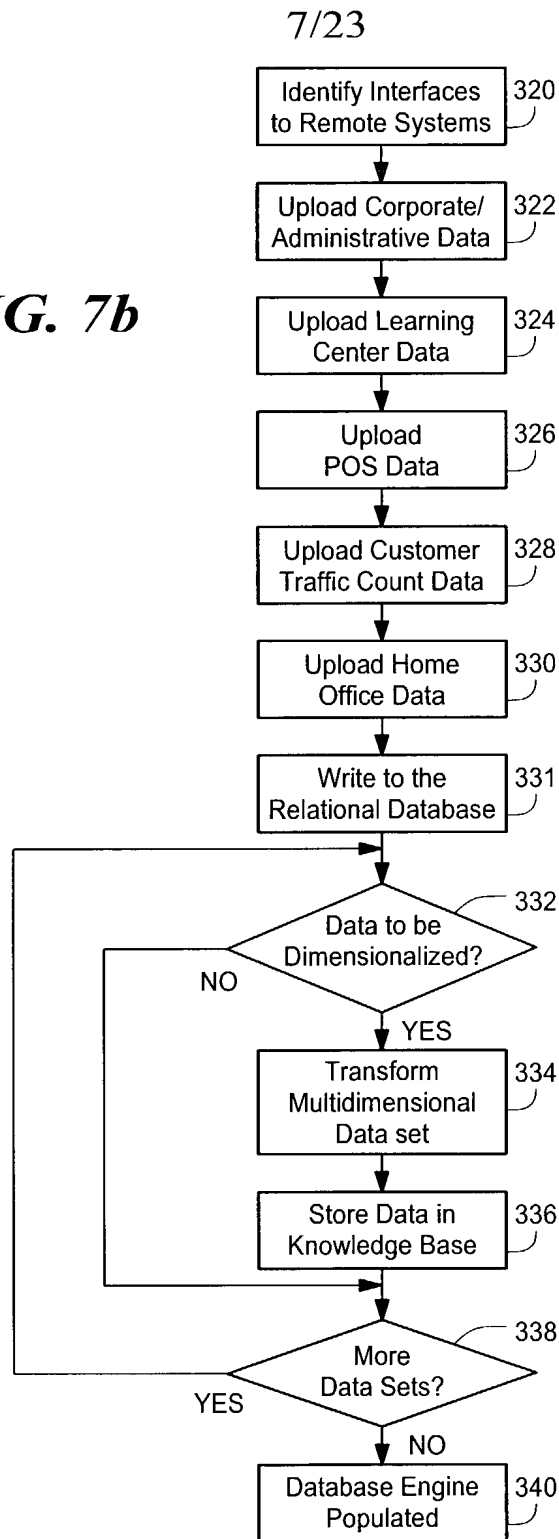


FIG. 7a

FIG. 7b

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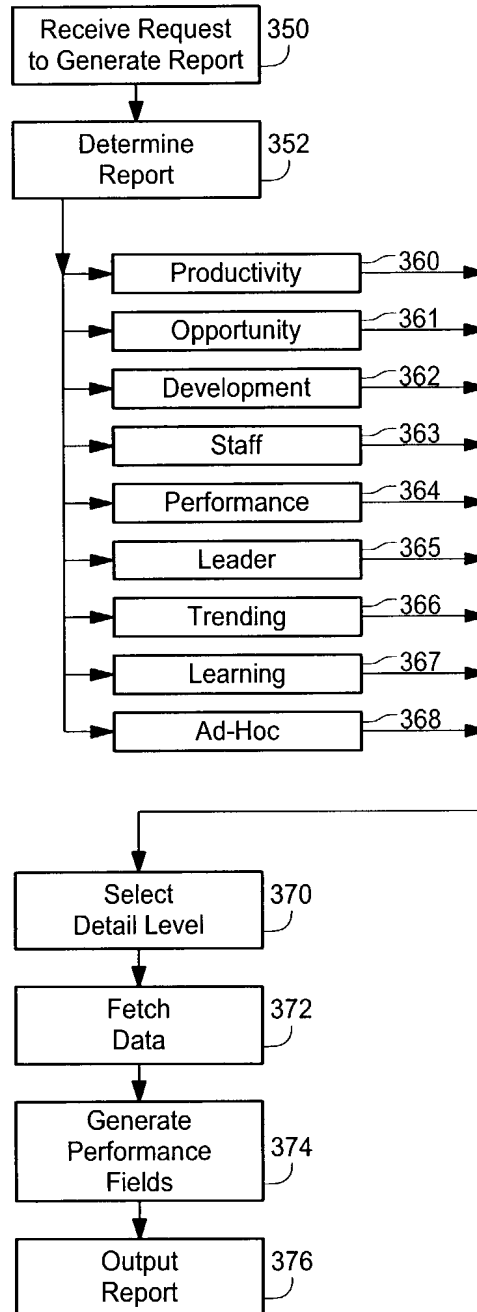


FIG. 7c

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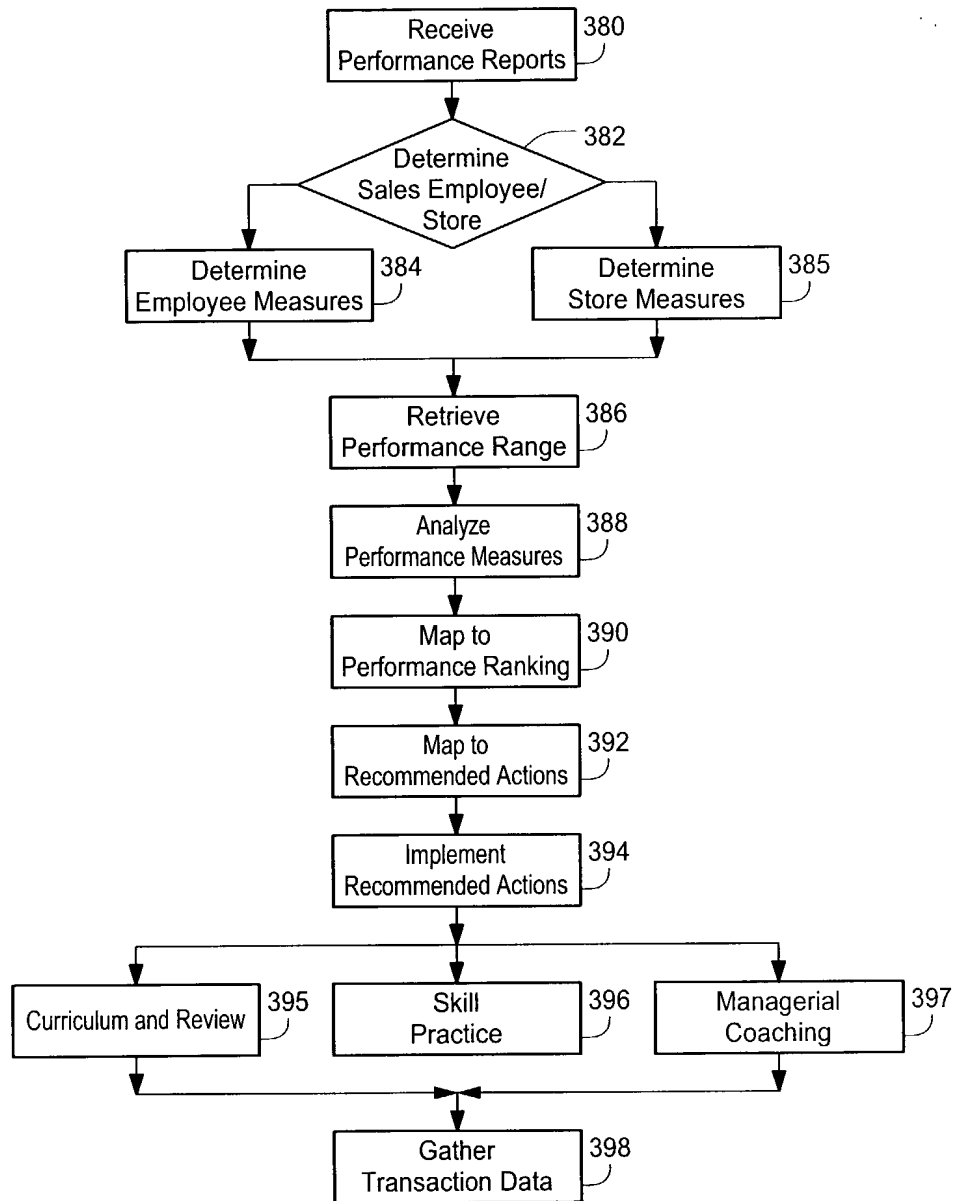
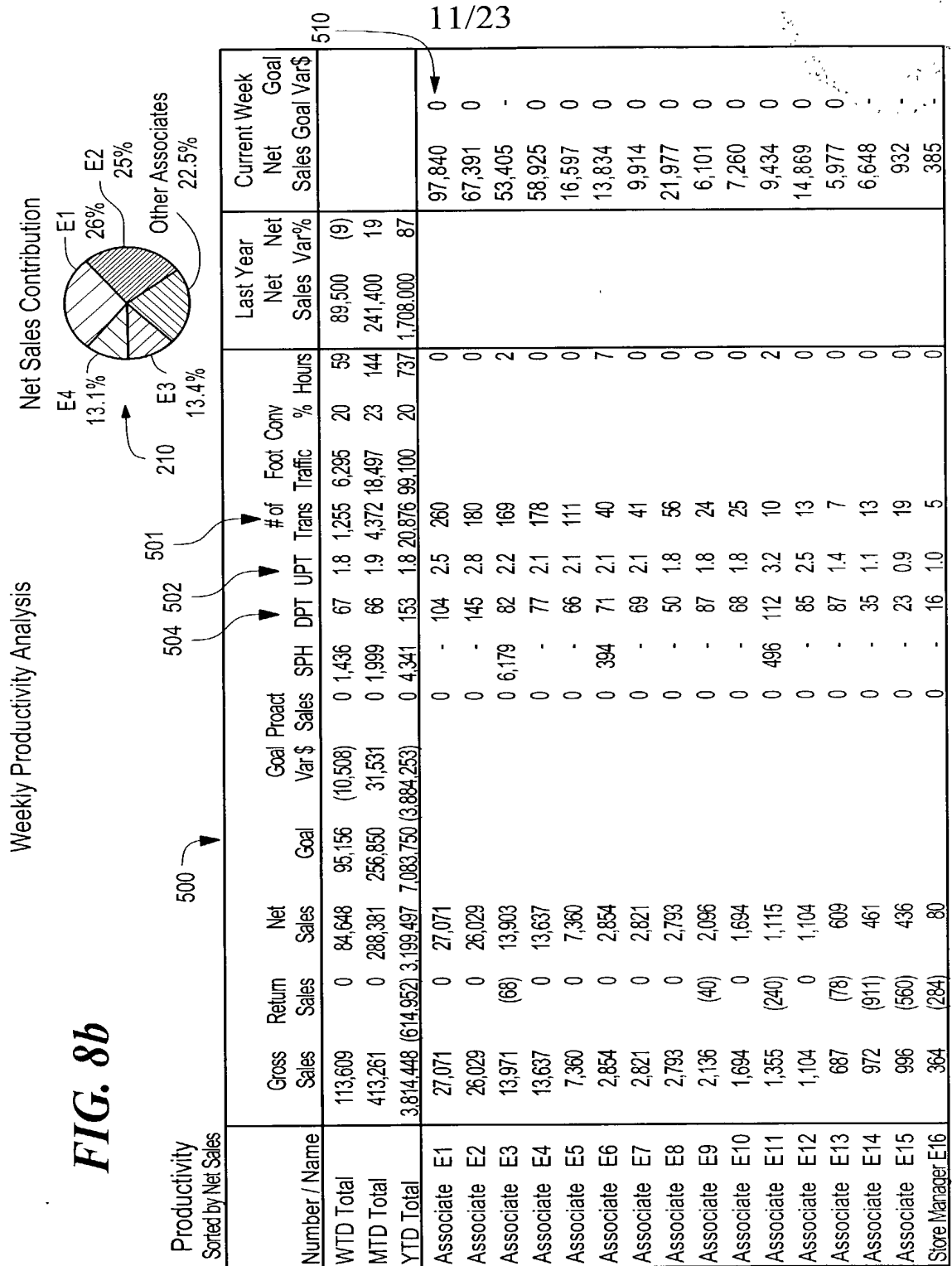


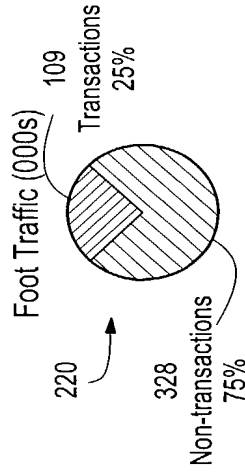
FIG. 7d

FIG. 8a



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Monthly Opportunity Analysis



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Conversion Analysis

		Totals By Hour (000s)												Other	
		9-10	10-11	11-12	12-1	1-2	2-3	3-4	4-5	5-6	6-7	7-8	8-9	9-10	Hours
Totals (000s)		1	5	9	12	15	14	13	12	10	7	6	14	2	0
Transactions (000s)	109	5	16	25	35	41	41	39	33	27	21	18	14	6	8
Non-transactions (000s)	328	6	21	34	48	55	55	51	45	37	28	24	18	8	8
Foot Traffic (000s)	437	11	21	24	24	24	23	23	24	25	23	22	22	25	5
Conv %	23														
		Conversion % By Hour													
		9-10	10-11	11-12	12-1	1-2	2-3	3-4	4-5	5-6	6-7	7-8	8-9	9-10	Hours
Number / Name	# of Trans (000s) # of Foot Traffic (000s) Conv %	31	73	30											
Connecticut / NY	28 127 22	5	27	32	31	31	30	29	33	36	30	17	27	27	4
Boston	33 156 21	4	21	23	24	24	22	22	22	24	25	26	24	24	0
MA / RI	17 81 22	19	19	22	22	22	20	20	22	21	21	19	20	25	17
New England		9	20	22	22	23	21	23	23	22	22	20	21	23	9

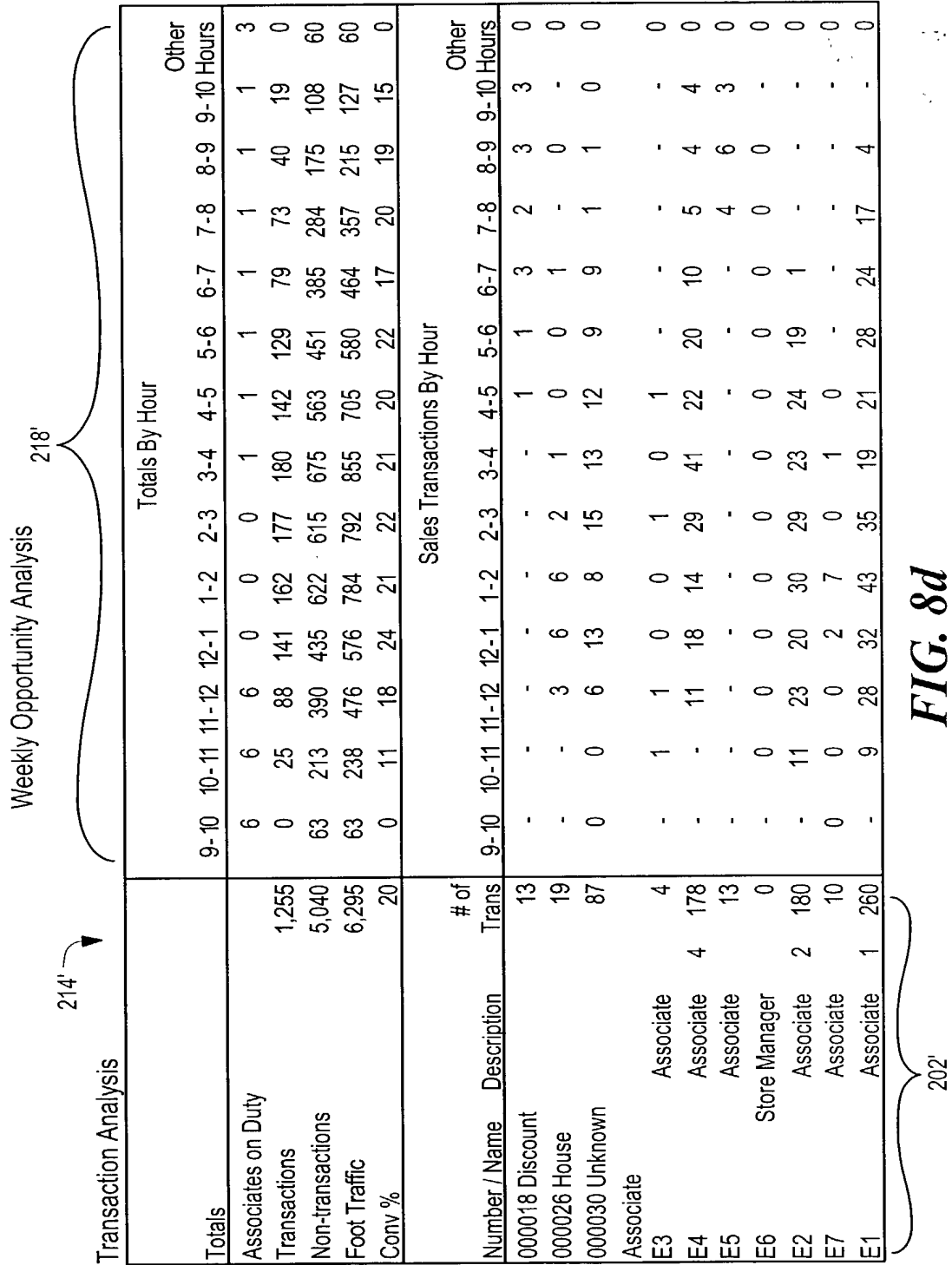
202

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218

FIG. 8c

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Development Analysis

Associate E1

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Productivity Summary

	Gross Sales	Return Sales	Net Sales	Goal	Goal Var \$	Goal	Proactive Sales	SPH	DPT	UPT	TPH	# of Trans	Hrs
MTD Total	110,058	(246)	109,812	-	-	-	0	-	150	2.5	324	730	2
YTD Total	265,451	(2,366)	263,084	-	-	-	0	-	146	2.4	800	1,800	2

224 226 228

222

FIG. 8e

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Performance Ranking

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Number / Name	Gross Sales (000s)	Return Sales (000s)	Net Sales (000s)	Goal (000s)	Var \$ (000s)	LY Net Sales (000s)	Proact Sales (000s)	% Total Sales	SPH	DPT	UPT	# of Trans (000s)	Foot Traffic (000s)	Conv %	Hours (000s)
Connecticut / NY	3,326	(729)	2,597	2,711	(114)	-	0	0	2,817	83	1.9	31	73	29	1
MA / RI	3,318	(767)	2,551	2,510	40	-	0	0	3,353	78	1.8	33	156	18	1
Boston	2,852	(569)	2,283	2,798	(515)	600	0	0	2,033	81	1.9	28	127	21	1
New England	1,795	(344)	1,451	1,327	123	-	0	0	1,769	83	1.9	17	81	20	1

236

238

FIG. 8g

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Leader Board

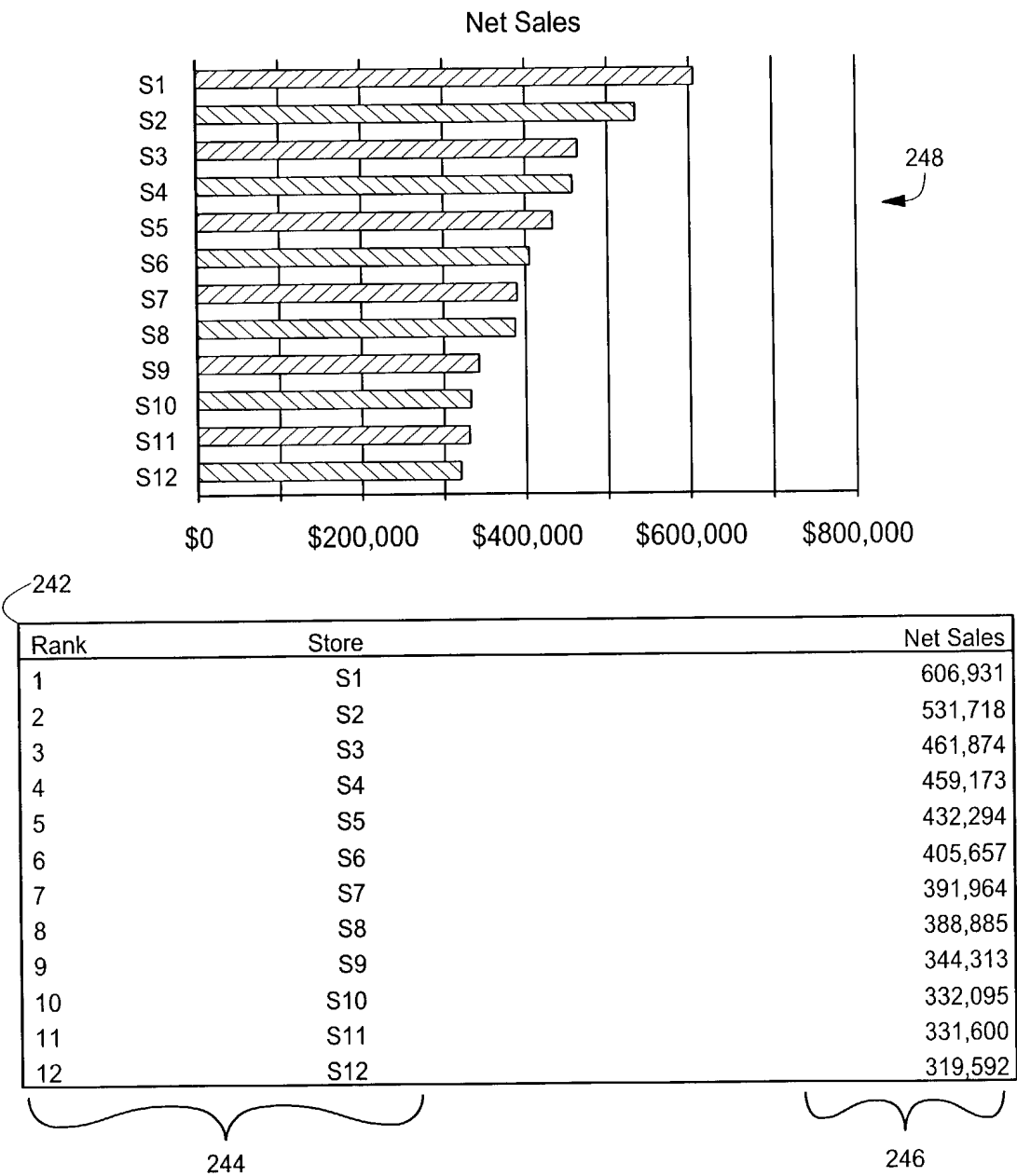


FIG. 8h

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Monthly Trending Analysis

250

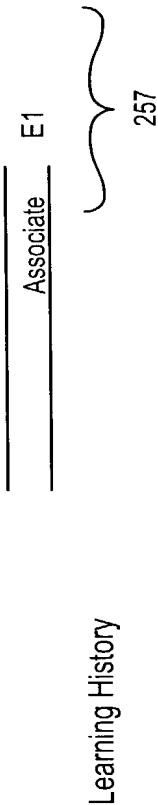
Productivity

Number / Name	2001 Period 10		2001 Period 9		2001 Period 8		2001 Period 7		2001 Period 6		2001 Period 5	
	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal
Total												
Net Sales	8,881,717	9,346,925	27,470	9,802,627	0	12,077,480	-	6,378,590	-	6,792,985	-	10,244,393
SPH	2,450	-	10	-	0	-	-	-	-	-	-	-
DPT	81	-	96	-	-	-	-	-	-	-	-	-
UPT	1.9	-	2.2	-	-	-	-	-	-	-	-	-
TPH	30	-	0	-	-	-	-	-	-	-	-	-
Conv %	23	-	1	-	-	-	-	-	-	-	-	-
Connecticut / NY												
Net Sales	2,596,960	2,711,111	0	2,763,975	0	3,418,083	-	1,695,117	-	1,963,114	-	2,958,411
SPH	2,817	-	0	-	0	-	-	-	-	-	-	-
DPT	83	-	-	-	-	-	-	-	-	-	-	-
UPT	1.9	-	-	-	-	-	-	-	-	-	-	-
TPH	34	-	-	-	-	-	-	-	-	-	-	-
Conv %	30	-	0	-	0	-	-	-	-	-	-	-
Boston												
Net Sales	2,283,313	2,798,237	22,098	3,280,156	0	3,985,591	-	2,156,003	-	2,072,636	-	3,271,754
SPH	2,033	-	38	-	0	-	-	-	-	-	-	-
DPT	81	-	103	-	-	-	-	-	-	-	-	-
UPT	1.9	-	2.3	-	-	-	-	-	-	-	-	-
TPH	25	-	0	-	-	-	-	-	-	-	-	-
Conv %	22	-	1	-	-	-	-	-	-	-	-	-
MA / RI												
Net Sales	2,550,825	2,510,361	78	2,500,513	0	3,118,615	-	1,589,860	-	1,706,599	-	2,652,819
SPH	3,353	-	0	-	0	-	-	-	-	-	-	-
DPT	78	-	78	-	-	-	-	-	-	-	-	-
UPT	1.8	-	1.0	-	-	-	-	-	-	-	-	-
TPH	43	-	0	-	-	-	-	-	-	-	-	-
Conv %	21	-	-	-	-	-	-	-	-	-	-	-
New England												
Net Sales	1,450,619	1,327,216	5,294	9,346,925	0	1,555,191	-	937,610	-	1,050,636	-	1,361,409
SPH	1,769	-	8	-	0	-	-	-	-	-	-	-
DPT	83	-	77	-	-	-	-	-	-	-	-	-
UPT	1.9	-	2.0	-	-	-	-	-	-	-	-	-
TPH	21	-	0	-	-	-	-	-	-	-	-	-
Conv %	22	-	1	-	-	-	-	-	-	-	-	-

252

254

FIG. 8i



256

Curriculum Description	Sequence Description	Course Description	Test Score	Start Date	Computer Date	Last Access Date	Course Time
Client Relationship	Associate Level	Associate Level Evaluation	100	05/16/2001	05/21/2001	05/21/2001	1.5
Client Relationship	Advisor Level	Advisor Level Evaluation	100	07/16/2001	07/23/2001	07/23/2001	1.5
Client Relationship	Consultant Level	Consultant Level Evaluation	100	09/16/2001	09/25/2001	09/25/2001	1.5

258 260 262 264

FIG. 8j

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Associate

# Trans	UPT	DPT	Action(s)
L	L	L	1 + 2 + 3
L	L	A	1 + 2
L	L	H	1 + 2
L	A	L	1 + 2
L	A	A	1 + 2
L	A	H	Congratulate on good job with the clients you work with 1 + 2
L	H	L	1 + 2
L	H	A	1 + 2
L	H	H	Congratulate on good job with the clients you work with 1 + 2
A	L	L	3
A	L	A	3
A	L	H	3
A	A	L	3
A	A	A	Congratulate on good job 3
A	A	H	Congratulate on good job 3
A	H	L	3
A	H	A	Congratulate on good job 3
A	H	H	Congratulate on good job 3
H	L	L	3
H	L	A	3
H	L	H	3
H	A	L	3
H	A	A	Congratulate on great job 3
H	A	H	Congratulate on great job 3
H	H	L	Congratulate on great job
H	H	A	Promotion Candidate
H	H	H	Promotion Candidate

L = Low, A = Average, H = High

1 = Preparing Yourself 2 = Engaging Client 3 = Sharing Information

FIG. 9a

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Advisor

UPT	# Trans	DPT	Action(s)
L	L	L	1 + 2
L	L	A	1 + 2
L	L	H	1 + 2
L	A	L	1 + 2
L	A	A	1 + 2
L	A	H	1 + 2
L	H	L	1 + 2
L	H	A	1 + 2
L	H	H	1 + 2
A	L	L	3 + 2
A	L	A	3 + 2
A	L	H	3 + 2
A	A	L	3 + 2
A	A	A	Congratulate on good job 3
A	A	H	Congratulate on good job 3
A	H	L	2
A	H	A	Congratulate on good job
A	H	H	Congratulate on good job
H	L	L	3
H	L	A	3
H	L	H	3
H	A	L	Congratulate on great job
H	A	A	Congratulate on great job Possible Promotion for Candidate
H	A	H	Congratulate on great job Possible Promotion for Candidate
H	H	L	Promotion Candidate
H	H	A	Promotion Candidate
H	H	H	Promotion Candidate

520 L = Low, A = Average, H = High

522 1 = Understanding Needs | 2 = Creating Solutions | 3 = Balancing Experiences

FIG. 9b

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Consultant

524

# Phone Contacts	# Appts	# Clients	Action(s)
L	L	L	1 + 2
L	L	A	1 + 2
L	L	H	1 + 2
L	A	L	1
L	A	A	1
L	A	H	2 + 1
L	H	L	1
L	H	A	Congratulate on working well proactively with client; find out why low phone contact
L	H	H	Congratulate on working well proactively with client; find out why low phone contact
A	L	L	2 + 1
A	L	A	2
A	L	H	2
A	A	L	2 + 1
A	A	A	2
A	A	A	Congratulate on good job
A	A	H	2
A	A	H	Congratulate on good job
A	H	L	2 + 1
A	H	A	2
A	H	A	Congratulate on good job
A	H	H	2
A	H	H	Congratulate on good job
H	L	L	2 + 1
H	L	A	2
H	L	H	2
H	A	L	2 + 1
H	A	A	2
H	A	A	Key player to leverage & possibly promote
H	A	H	2
H	A	H	Key player to leverage & possibly promote
H	H	L	Key player to leverage and promote and find out why low clients
H	H	L	1
H	H	A	Key player to leverage and promote
H	H	H	Key player to leverage and promote

L = Low, A = Average, H = High

1 = Offering Services 2 = Delighting Clients 3 = Driving Business

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FIG. 9c

Docket/App No.: 3183.1000-001
 Title: System and Method for Measuring...
 Inventors: Kin Chung Fung *et al.*

23/23

Level:

Store

Usage of DCE Tools	Sales Associate Issues	Team Composition	Action(s)
N	L	L	Congratulate on good job 3
N	L	A	Congratulate on great job
N	L	H	Congratulate on good job 3
N	A	L	3
N	A	A	No action - watch for improvement
N	A	H	3
N	H	L	2 + 3
N	H	A	2
N	H	H	2 + 3
Y	L	L	1 + 3
Y	L	A	1
Y	L	H	1 + 3
Y	A	L	1 + 3
Y	A	A	1
Y	A	H	1 + 3
Y	H	L	SM needs immediate help. 1 + 2 + 3
Y	H	A	SM needs immediate help. 1 + 2
Y	H	H	SM needs immediate help. 1 + 2 + 3

N = No, Y = Yes

L = Low/Under staffed, A = Average/Appropriately staffed, H = High/Over staffed

530	1 = Phone SM and schedule store visit to discuss learning tools
	2 = Plan store visit and coach SM to prepare individual development plan
	3 = Plan quarterly/semi-annual store visit to review personnel strategy and development plan

FIG. 9d